



## San Antonio Legal Services Association

P.O. Box 8029, San Antonio, TX 78208

Sa-lsa.org / (210) 239-1882

### **What to do with Estate Planning Documents After Signing**

*\*\*\*\*\*SALSA does not retain copies of these documents. Nor does it provide legal assistance regarding these documents after the clinic's conclusion. Please distribute copies of these documents as soon as possible to avoid them becoming lost.\*\*\*\*\**

#### **Can I make copies of the documents? Can I write on the documents?**

If you want to make copies of the documents, please **DO NOT REMOVE THE STAPLES**. If the staples are removed, it may raise a question about whether the document has been altered from its original form. Also, please do not write on or otherwise mark the documents, outside of the areas provided, as it may invalidate them.

#### **Who gets copies of my documents?**

1. Statutory Durable Power of Attorney - give copies to your bank and the person to whom you are giving the statutory durable power of attorney to make the decisions regarding your finances and other assets (your agent). Please keep the original for your records.
2. Medical Power of Attorney - give copies to your treating physician, the VA, and the person to whom you are giving the medical power of attorney to make the decisions regarding your health (your agent). Please keep the originals for your records.
3. Directive to Physicians and HIPAA Release - give copies to your treating physician and VA hospital. Please keep the originals for your records.
4. Declaration of Guardian –give copies to whomever you have designated as your guardian of the person and estate. Please keep the original for your records.

#### **Where should I store the original documents?**

1. If you have a safe deposit box and are interested in storing your documents there, it can be helpful to have two (2) names on the safe deposit box. A court order may be needed to open the box if only your name is on the box, which means court costs and attorney's fees prior to the probate.
2. If you have a lock box at home, you may wish to place the papers there.

**Wherever you choose to store your estate planning documents, remember to tell the Agents named in these documents where the original documents are located!**